

The TRUE ADVISOR REPORT™

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TRUE ADVISOR OF THE MONTH **TRAVIS TERLAU**

It's All About Them

Travis Terlau may be one of the youngest advisors with Producers Equity Group, but he is building a solid business with the wisdom of an industry veteran.

Travis started his own practice five years ago after being an assistant to another successful PEG advisor for two years. Fast forward to this year: He has already had a million-dollar-month, is on the verge of another million-dollar-month and is on track to be one of CRP's Top 10 Advisors of the Year.

Success at such a young age can ruin many, but Travis is quick to say, "It's not about me. We are in this business to serve other people, and our clients are the driving force to our success. It's really about them. As the saying goes, people don't care about how much you know until they know how much you care. So we love our clients first and we work on the details later. They know we care and have their best interest at heart.

"We call our clients 'family members' and we treat them like family. I tell every new client, 'Welcome to the family' and I love them like I'm their parent. I consider myself an educator and protector. I protect their estate. Clients tell me, 'You know, I was up nights for the longest time until I met you. Now I can sleep at night.'

"My best advice to other advisors is to always work on getting better, and never make it about yourself. Once you start making it about yourself, and not about your clients and your family, you lose your edge. When you make it about others, however, you consistently want to make yourself better in order to serve them better. You continually better yourself, not just with education and licenses, but with your approach to clients, the way you love your clients, and your personal life. Once you stop making yourself better, you lose it."

The care that Travis shows his clients has translated into referrals to the extent that most of his seminar attendees are clients and their referrals. "One of the things we are most happy about is our client referral system," explains Travis. "I don't ask for referrals. In fact, we have been able to 'condition' our clients over the last few years, with subtle marketing approaches that get them to want to bring folks to our events. We make the process very comfortable for clients.

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